Gender equality and quality of life –
how gender equality can contribute
to development in Europe.
A study of Poland and Norway

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Well-being and Social Development in the Context of Gender Equality

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Abstract

This study concentrates on three major fields listed in its title: notion of well-being, understanding of social development and striving for gender equality. Due to complexity and diversity of approaches all of them are shown in lights of different theories, which to some extent I try to reflect in this paper. Additionally, to meet the goal of "Gender equality and quality of life" project, that is a construction of a new indicator, I summarise existing indexes on well-being and gender and juxtapose them in tables. This operation enables the readers to have a clear picture of focus areas and development trends of these measures, followed by the message they send. Critical reflection on the presented models and the final discussion might help in the future work on quality of life and gender equality issues, their measurement and interpretations.

Introduction

The meanings of a good standard of living[1], happiness and gender equality seem obvious and understandable to all. However, as soon as we look deeper into their sematic layers we discover that they require more precise defining, which is always bound with our values, beliefs or points of view. One of such subjects is gender, therefore in this paper I characterise it after Ann Oakley as psychological and cultural term, distinct from biological "sex". In her book Oakley arguments further:

> [t]o be a man or a woman, a boy, or a girl, is as much a function of dress, gesture, occupation, social network and personality, as it is of possessing a particular set of genitals. This rather surprising contention is supported by a number of facts. First, anthropologists have reported variation in the way different cultures define gender. It is true that every society uses biological sex as a criterion for the ascription of gender, but, beyond that simple starting point, no two cultures would agree completely on what distinguishes one gender from the other. Needless to say, every society believes that its own definitions of gender correspond to the biological duality of sex. Culturally, therefore, one finds the same biological distinctions between male and female coexisting with great variations in gender roles. By contrast one also finds individual people whose culturally defined genders coexist with indeterminate sex. (Oakley 1972: 158)

This illustration can be put together with the determinants of the people's social status to show different roles, rights and opportunities assigned to them in certain cultures, which depend on their sex. The persistent inequality of these roles inclined the long-standing research, political commitment and many grass-roots activities dedicated to gender equality. This research project is one of them. The interesting and new combination presented here is the link between the standard of living and gender equality, on which not only the earlier research point (see Chapter 3), but also quoted indexes. This study consist of three major parts: Chapter 1 dedicated to the

1 In spite of certain epistemological differences between them, I am using the terms of „good standard of living", „quality of life" and „well-being" interchangeably in this work. The living standard is usually seen through the lenses of income, while the quality of life indicators are equally based on value of one's possessions and employment, and on dimensions of environment, health, education, leisure and belonging. Finally, wellbeing covers both objective and subjective measures of its perception.

different definitions and conceptualisations of well-being, Chapter 2 focusing at the notions of social change, social development and happiness and Chapter 3 devoted to gender equality theories and their exemplifications. The paper closes discussion and final conclusion.

1. Research on Good Standard of Living

For many people, the quality of life or good standard of living signifies a possibility of fulfilling one's desires. The latter may be seen as moving beyond both biology (meaning i.e. exceptional nutrition or coveted leisure patterns) and material standing (understood as the level of income and/or the worth of one's possessions), but rather be viewed as pertinent to one's higher needs such as cultural participation or satisfaction derived from social interactions. A question that nevertheless arises is how people know what they should desire? Hence, it is here where we note that our desires are neither spontaneous, nor do they reflect any natural order of things, but are solely resulting from a fictitious creation instead. We are taught to want. Regardless of whether our desires are fulfilled or not, they can only revolve around a given scope of the *imaginarium* that we are aware of. Such interpretation relates to Jaques Lacan's triad of symbolic-real-imaginary psychoanalytic orders (Lacan 2006). In regards to a given cultural framework, a standard of life in its symbolic dimension may suggest that we follow one of the available life patterns and conduct normal activities, inclusive of the accessible comforts which are common and widely recognized by our society at that specific historical period. Being an unwritten constitution of society, this order creates, particularly in the area of consumption, illusions that we learn and use in framing our limited choices. It is also this conceptual map that Zygmunt Bauman is recalling in his critique of consumerist culture:

> Whatever choice consumers may make, they would never step beyond the choice on offer, and the choice on offer is not itself matter of consumer choice. It is dictated by unchosen, unelected managers – global companies which come ever closer to monopolistic rule over consumer markets (Bauman 1998: 101)

This is important in shedding light on the later presented indicators of happiness, for which final values are largely dependent on one's subjective perception, occurring under constantly changing set of reference points.

Conversely, the imaginary level, which assumes moving beyond the accessible scenarios, could allude to taking on alternative values and life pathways, such as the ones derived from social agreements and institutions (understood as norms, rules and common strategies) operating in different cultural settings and communities. This attitude would signify choice and power of human agency that allows fulfilment of different models of being, perhaps unrelated to the generally

accepted „life standard". In those cases, any measurements obtained with pre-existing synthesizing indicators could be invalid, making subjective evaluation of happiness far more prominent. Alternative lifestyle cannot be equated with an abandonment of „possibilities" (defined in Amartya Kumar Sen and Martha C. Nussbaum's works outlined below), but rather as something made achievable by them.

The final element of Lacan's triad - the real order - encompasses an entire set of accidental circumstances and various individual or group characteristics that influence the decisions that are being made. Those are difficult to take into account in a universal indicator examining average life quality of men and women in a given population and are, thereby, important to remember when interpretations on the occurrence of alternative indications for different world regions are being attempted.

Subjective perception of well-being

The discussions above pertain to both subjective (individual) perception of well-being and objective fulfilment of needs (e.g. one's satisfaction from social relations). Basic split into subjective/objective is notable in the large body of literature that constitutes theoretical grounds for well-being research and pinpoints various criteria for evaluating life quality. The **subjective perception of well-being (SWB)** is linked to individual's experiences of pleasures and pain. A Nobel Prize Winner Daniel Kahneman, who has conducted research in this area, claims that people „generally do not know how happy they are, and every time this question is posed to them, they have to construct their answer anew" (Kahneman 1999). Asking this and alike questions could be viewed as an approach more democratic that expert opinion imposed from above, however, as Kahneman argues, an objective measurement of well-being should be constructed on the basis of happiness' perception at a given moment. American psychologist Edward Diener has contributed to creating such measurement, indicating its two main elements as: emotional reactions (positive and negative affects) and cognitive judgements (life satisfaction) (Diener 1984). The emotional reactions encompassing pleasures and pain were, however, measured separately as follows:

1 High level of pleasure + low level of pain = happy
2 Low level of pleasure + high level of pain = unhappy
3 High level of both pleasure and pain = emotional
4 Low level of both pleasure and pain = unemotional (Diener and Lucas 1999)

The latter two categories were particularly helpful to the discourse on differences between „hedonic balance" results in the countries examined. For instance, while Turkey and Japan had identical average scores for notations of pleasure and pain, the level of both indicators were higher

in Turkey, which could be interpreted as a higher degree of emotionality among Turkey's inhabitants participating in the study. With addition of this last variable, four categories have been established:

1 happy and satisfied
2 unhappy and unsatisfied
3 happy and unsatisfied
4 unhappy and satisfied (Diener and Suh 1999)

Once again, the two final classes are the most interesting, as they can indicate contradictions (stating that people are in many regards ambivalent) on the one hand, or they can reflect different dimensions of subjective perception of life quality on the other hand, showcasing attitudes towards chance occurrences as one example for when both categories are significant. Further studies using SWB have demonstrated a strong correlation between well-being and physical and mental health. Michael Argyle has shown that happy people are more altruistic, generous and social; they may be more productive at work and potentially deal with problems better (Argyle 1996: 37-8). Nevertheless, SWB remained a widely critiqued measurement, particularly for its operationalisation of well-being in reference to hedonism. In that sense, an alternative eudaimonic interpretation of individual's quality of life should be based on criteria more robust than perception of pleasure, and reflect on the issues of self-fulfilment (meaning individual's degree of determination) and acknowledge theory of autonomy (Phillips 2006).

Gallup Global Wellbeing Index has been developed in this context at the first and famous Institute commissioning public opinion polls. With the use of Cantril's Self-Anchoring Ladder technique, the Institute annually collects respondents' evaluations of their present and future positioning. The technique employs a question about levels of life satisfaction, where scale of 0-10 is used for marking one's possible life from worst (0) to best (10). People who rank their current levels as 7 or higher while at the same time predicting their future standing to be in the 8-10 range are called „thriving". Conversely, those who indicate 0-4 range as either their present or envisioned status are classified as „suffering". Finally, those who remain are described as „struggling". The 2010 results for 155 countries are available online at: http://geographic.org/country_ranks/global_wellbeing_index_2010_country_ranks.html (access 9.02.2014). Poland ranks 57th and has 10% of the answers located in the lowest range, while Norway takes 3rd place, having no answers in the lowest range. The table presented on the abovementioned website also includes results depicting average value of the everyday life quality derived from ten elements referring to daily experiences, namely: feeling well-rested, being treated with respect, laughing, learning/interests, joy, physical pain, worry, sadness, stress and

anger. Daily experiences are dichotomously evaluated on the 0-10 scale where higher results signify better days, which those filled by positive rather than negative experiences and states. For this case, Poland's result came out as 7.1, while Norway's as 7.9, with an important notation of the edge cases: 5.0 minimum for Togo and 8.4 maximum for Panama.

Since 2008 Gallup's Institute is cooperating with Healthways Company on the **Gallup-Healthways Well-Being Index™**, initially limited to the US until 2013 but examined for 140 countries of the world as of 2014. The five elements of life quality that this index is using are: determination (motivation for achieving goals and enjoyment over what one does every day), socialization (supportive relationships and love), finances (managing them in a way that reduces stress and increases security), community (appreciation of one's residence, feeling safe, pride of belonging), physical capability (good health and energy for performing everyday tasks) (Healthways 2014). More than 353 thousand interviews were conducted in preparation of the general indicator for all of the US states. Data was collected under six categories, including life's evaluation based on the earlier described Cantril's Self-Anchoring Ladder technique applied to a five-year perspective. In regards to emotional health respondents were being asked to assess their last day prior to the interview and answered question about their feelings in concurrence with ten components outlined above under Gallup's daily life quality. The only new adaptations were that "physical pain" was replaced with "happiness", while "diagnosed depression" was added at the end. Then physical health was assessed through nine elements: number of sick days in the last month, denoting disease by referencing QLAY or DALY described in the following paragraphs, health issues disallowing normal functioning, obesity (BMI), rest, daily energy, colds, flu infections, daily headaches. Subsequently, health-related behaviours were tackled and included ideas about habits, daily routines and addictions, for instance smoking, healthy diet, weekly consumption of fruit and vegetables, frequency of physical exercise. Further elements included work environment (job satisfaction, using one's strengths, hierarchical versus partnership-oriented attitudes of superiors, open and trust-based work environment), and, finally, aspects of basic access that encompass satisfaction with local community and place or residence, residential area's improvement in respect to the life quality, clean water, access to medication, safe place for exercise, affordable fruit and vegetables, feeling safe at night, sufficient income to secure basic provisions of food, shelter, healthcare, last visit to a dentist, being registered with a doctor, having medical insurance (Gallup Inc. 2009). The research presented above on the one hand shows departure from showing only the subjective (individual) perspective, on the other hand it forefronts the agency of individuals, their integrity and autonomy. In turn, for many theories the issue of autonomy is connected to fulfilling

opportunities offered to the individuals by their social setting. Those opportunities will be discussed next.

The capabilities perspective

One of the most influential and world-recognized theorizations of life quality is Amartya Kumar Sen's theory of capabilities (1993), which underlines the importance of individual freedom of choice between different options under the existing constrains. According to Sen, who purposefully avoids supplying a list of specific capabilities, we prosper as people if we have the skills and liberty to make our choices between different capability sets. Those sets represent distinct doings and beings, which the author denotes as "*functionings*". Said functionings may encompass both basic actions and states (for instance, performing a satisfactory job, feelings of safety or good health) and those more complex ones, such as being happy, esthetical experience, being knowledgeable about something or satisfactory relations with others. In this theory, the capabilities would signify the opportunities to choose among the given functionings. In practice, Sen has specifically focused on basic capabilities, which he deems a capacity to fulfil the specific core and crucially important functionings to a minimally adequate standard (ibid.: 40), deemed as allowing avoidance of sickness and death, while securing appropriate nutrition, mobility, and so on (ibid.: 36). As already indicated, aside for the outline of the basic capabilities, the author averts formulation of a specific list of capabilities that impact on achieving a good living standard, as for him the freedom of choice constitutes the basis of the very notion of a capability. This controversial standing was later ignored by the philosopher Martha C. Nussbaum, who, in fact, has created such a list and prioritized utilitarianism and its rules in her discussions. Nussbaum has argued for the existence of objective norms of human capabilities that are independent of culture, society or class. While this argument was often criticized by other scholars, Nussbaum provides **a list of ten capabilities:** a life worth living, life of a normal duration, physical and reproductive health which includes nutrition and shelter, bodily integration with an ability of movement and protection against violence, capability of senses, thoughts and imagination; emotions and expressing them without fear; reflectivity and inference; belonging (both in terms of relations with others/ for others and as grounds for being respected and recognized); coexistence with other species; entertainment and rest; control over political and material environment (Nussbaum 2000: 78-80). Since this list is grounded in an individual's organization stemming from Aristotle's practical reason, which means making appropriate choices of actions leading to the said good standard (Qizilbash 1998: 55), it can only be valid for an individually-derived good standard of life. According to

Nussbaum (2000: 72), the identified capabilities are those spheres of human experiences that, to a lesser or greater degree, occur in every human's life, so that every human being will have to make distinct choices within those areas. Despite this perspective being oriented towards agency (because, actually: does so much really depend on us?), contributions made by Nussbaum should be seen as significant in light of the complexity of the operationalisation done for the quality of life theme. Similarly to Sen, she has underscored the importance of fulfilling basic needs and a necessity to take on a primary goal which comes down to all people meeting and crossing that minimal threshold of capabilities, so that they can all equally benefit from the capabilities described above. Only then the societal efforts can be directed at other endeavours.

Stemming from Sen's theory (with Nussbaum's later theory being much more complex), the **Basic Capabilities Index** (BCI) developed by Social Watch organization is based on three capabilities. The measured aspects include: being well-nourished (with child mortality for under 5s is used), healthy and safe reproduction (maternal reproductive health), and education and knowledge (registrations for primary schooling, literacy, numbers of children finishing 5th grade) (http://www.socialwatch.org/node/13749 access on 19.02.2014). The latest 2011 study has comprised 167 countries among which Poland placed 33rd and Norway 2nd. The organization's website can be also used for viewing trends on the state of this index since 1990. As a non-monetary indicator (compared to the majority of instruments that are based on indication made on how many members of the population live for less than one dollar per day) , BCI constitutes an alternative for the existing poverty measurements. As it relates to quality of life issues, it is based on the basic human needs, indispensable for survival and human dignity.

Needs-fulfilment-based orientation

In their publications both Sen and Nussbaum have referred to theories of human needs. The theoretical grounds for those have been laid by Len Doyal and Ian Gough in the early 1990s (Doyal and Gough 1991). **Theory of Human Needs (THN)** is based on two universal goals of avoiding significant harm and ability to participate. Those goals are said to prevent an application of the model of either cruel or exploitative social system described by the authors. Nonetheless, the assumptions require answers to two basic needs of physical health and autonomic agency. The authors argue that in order for individual members of the society to be able to complete their social obligations posed by others, those two needs must be socially fulfilled. This means that meeting this condition constitutes a moral obligation of societies, leading to emancipation, even in light of the rise of globalization. In regards to definitions, the authors see optimal level of physical

health as a complete physical, mental and social well-being, inclusive of individual's autonomy. They also pinpoint survival possibility and achieving optimal life duration upon decreasing functions resulting from aging. Referring those difficult and complex issues of basic needs, Doyal and Gough round them up by using a notion of autonomy of action as a characteristically human trait. Said autonomy is understood as a capacity of making informed decisions as to what should be done and how it should be completed. Both health and autonomy can be achieved through fulfilment of eleven indirect needs defined by Doyal and Gough as nutritious alimentation and clean water; residence that guarantees shelter; work environment safety; safe contraception and child-birthing environment; appropriate healthcare; safeguarded childhood; basic relationships with others; health and physical security; economic safety; proper education.

It is possible to compare indirect and basic needs reviewed by Doyal and Gough with the composition of the **Human Development Index (HDI)** created in 1990. This indicator, one of the most famous references to the idea of basic needs, is also based on the criterion of national income, for the reasons of guarantying its methodological validity, as its creator, Mahbub ul Haq, has claimed (1996). As an objective measurement, HDI is grounded in the available quantitative data pertaining to the living conditions rather than subjective evaluation of those conditions made by people. Among other aspects, HDI includes literacy, which is concurrent to earlier presented indirect need for education under THN. In addition, the component focusing on life expectancy mirrors physical health discussed in THN. The three elements taken into account by the HDI, namely the National Gross Income (GNI) per capita, life expectancy and literacy measured by the completed years of education, are used to locate and rank different countries, yet it is not necessarily explained what the achieved results signify. Eventually, we can only conclude that residents of a country with a higher HDI score are faring better than those who reside in a country with a lower score. This criticism is equally valid for other measurements based on quantitative data discussed below. In addition, HDI calculates averages for entire populations, irrespective of the levels of inequality and exclusion, thusly becoming unable to differentiate what proportion of the population is situated below the level of basic needs' fulfilment already discussed in this work. In essence, the United States have obtained a 0.910 score, which is the fourth highest in the world for the year 2011 (UNDP 2013a). At the same time, the Gini's index (denoting income differences between the 20% of the richest and 20% of the poorest households) for the US has been calculated as 0.38, placing them only 31st in the world ranking. For comparisons' sake, in 2011 Norway has reached a HDI of 0.953 (world's best) and Poland's result was 0.819 (39th place). With regards to Gini's index, Norway's measurement was 0.25 (3rd place) and Poland's 0.31 (19th position) per

OECD's Factbook (2011).

Critical assessment of the overall life quality indicators existing today and the Gross Domestic Product as a particular measurement has resulted in further research into alternative measurements, intensified especially since the 1990s. Among the developments, **Index of Sustainable Economic Welfare (ISEW)** by Herman E. Daly and John B. Cobb deserves a mention (Daly and Cobb 1994). This index considers individual consumption reflected in the social inequality coefficient based on Gini's Index. What is moreover interesting is the fact that it does not only include unpaid work, but equally encompasses costs of human actions (i.e. degradation of natural environment). Aside for the above, ISEW calculates value of durable use consumables, value of transportation routes' (streets and highway) services, state expenditure on education and healthcare betterment, net capital gain and foreign investments balance. Negative values of the index are supplied by: costs connected to air and water pollution, as well as noise levels; costs of non-renewable natural resources' depletion; losses of farmland and wetland; long-term ecological damage; depletion of the ozone layer; and spending resulting from healthcare and education, commuting, urbanization and traffic accidents (ibid.: 462-463). Some countries collecting data for calculating this index are: Austria, Chile, Germany, Italy, the Netherlands, Scotland and Great Britain (Talberth, Cobb and Slattery 2006: 3).

The **Genuine Progress Indicator (GPI)** is a certain modification of the ISEW which also founds its calculations on three steps. The first one is an estimation of consumption expenses weighed against inequalities linked to income distribution. Secondly, the non-market benefits are added, including aspects of household work, value of higher education, voluntary work, durable use services and advantages of the public infrastructure. Finally, the subtraction of costs regarding violence, loss of leisure time, costs of unemployment, durable use goods, commuting and expenses incurred by households due to necessity of pollution management (i.e. costs of water filters), as well as costs of traffic accidents, air and water pollution, noise, loss of farming land, marshlands and forests, depletion of natural resources for the next generation and carbon dioxide emission. At the end, a balance of investments (+/-) is considered with a subtraction made for foreign debt (specific calculations for the 1950-2004 timeframe can be found in the 2006 volume by John Talberth, Clifford Cobb and Noah Slattery). Due to the fact that aspects of work for the household and benefits from the infrastructure on one hand, and costs of violence on the other, are included in this measurement, it can constitute a good starting point for further debates on the question of an index that links quality of life debates with gender matters.

In early 1990s, both human development theory experts and ecological economics have

come to a consensus in claiming that increased supply of money within the economy has negative effect on the quality of life of male and female residents. Discontinuing public and social services as well as limited care for ecosystems from the state's side, for which citizens have to pay themselves for ever since, can perhaps be stimulating for the economy, but are clearly devastating for the lives of men and women inhabiting the areas in question. Those occurrences are discussed by Adjusted net savings or **Genuine Savings Indicator**, which corresponds with equality theory. Calculated by the World Bank, it takes into account the size of gross savings adjusted for the depreciation of the size of capital necessary for producing durable goods, subsequently adding educational spending (seen as human capital investment), then subtracting the depletion of natural resources (linked to electrical energy production and mining of minerals), deterioration of forests and costs of environmental pollution (estimated from the data gathered on healthcare and diseases linked to air pollution locally and from the data on carbon dioxide emission globally) (World Bank 2008).

While the indicators discussed so far do not necessarily talk about the quality of life, they stand out as the most important alternatives to the Gross Domestic Product measurement based on quantitative data. In this regard, the achievements of Polish scholars should also be mentioned. At the United Nations Research Institute for Social Development (UNRISD) in early 1970s, Jan Drewnowski has presented the basis for the **distance method**. It is known for measuring welfare and level of living on the grounds of indicators that are expressed in natural instead of value-oriented units. Selecting groups of household needs, such as material and cultural (fulfilled by streams of goods, services and collective consumption) was a first step of this method. Next, the measures for each group of needs were aligned and two borderline values of minimal (1 point) and maximal (100 points) were established. By integrating partial results, one synthetic measurement of life quality could be obtained. Scale (distance), however, was used to depict how the level of living within the population was comparable to the maximal state. This method has been adapted to Polish conditions by the Main School of Planning and Statistics (today's Warsaw School of Economics) and used in research on the level of living among Polish people conducted during the 1988-1989 period. Furthermore, in 1974 Mieczyslaw Rakowski has put forward a measurement of economic welfare done through the **Value Aggregators Method** (Polish: *metoda agregatów wartościowych* - ***MAW***), which classified such elements of well-being like estate-derived income, transportation and communications. He has significantly covered a range of qualitative distinctions which are difficult for both indirect and direct measurements (UNDP 2012: 22). It therefore speaks to reason that both men – Drewnowski and Rakowski - were on the frontlines of qualitative

measurements of life quality in Poland and beyond. The final noteworthy Polish work on the subject is the **Social Diagnosis** (Czapinski and Panek 2013) published since the year 2000 and somewhat linked to the MAW's components. This study has been conducted seven times thus far and the number of participating household has successively risen from just over 3 thousand in 2000 to over 12 thousand in 2013. This signifies an increase from roughly 6 thousand to over 26 thousand members of households, men and women aged 16 and above. The authors of the study have divided social indicators into two categories: living conditions (objective description of a household) and quality of life (subjective evaluations performed by household's members). The data for the first indicator has been collected through a face-to-face individual interview with a person "most knowledgeable about the household's situation", while the second indicator was based on the self-administered questionnaire filled by household's members aged 16 and above (Czapinski and Panek 2013: 14). The first indicator covers components of income situation, nutrition, material possessions (including communication technologies), residential conditions, social welfare support, children's education, leisure and cultural participation, medical services' usage, employment and aspects of social exclusion (poverty, unemployment, disability). The second indicator, pertaining to quality of life and lifestyle, incorporates mental well-being, satisfaction with given aspects of life, evaluation of material level of living, existence of different types of life stressors, their somatic symptoms and strategies of dealing with stress, using medical services, personal finances, system of moral values and lifestyle (including habits), social capital, civil attitudes, usage of communication technologies, employment, social exclusion and reasons of low fertility among the Poles (Czapinski and Panek 2013: 14-15). Questionnaires and instructions for research assistants can be found in the first annexure of the volume (ibid.: 415-460). This wide-net project, deployed to a large sample and rich in subsequent analyses, is certainly impressive and can serve as a point of departure for building GEQ indicator, especially since gender was one of the criteria used for classification of household members (ibid.: 35). A comparison between those with eudaimonic and hedonistic attitudes, which showed that the former enjoy better life by many regards, has been particularly interesting (ibid.: 22). This perspective moves us closer to social approach and measurements stemming from it presented in the following sections.

Social approach

As already mentioned, individual-centred approaches and their focus on fulfilling desires are often criticized by scholars researching quality of life topics. The first problem is posed by the „content slave" attitude, which has largely been theorized in reference to women. If women live in

a society that limits their freedoms, some of them may develop adaptation strategy, which allows them to make the best out of a bad situation rather than form resistance against servitude they consider inevitable. That way, they can be happier than these women who, for example, consciously decide to take action towards social change in a given society (Philips 2006: 62-64). Second problem concerns individual choices and maximizing utility (hedonistic attitude). Happiness is often equated with fulfilment of individual desires and means specific life experiences, for instance the activity of shopping mentioned at the beginning of this paper. People often maximize their utility by obtaining what they actually want in lieu of what they should want, or could want, had they been given complete information. According to James Griffin, these kinds of people replace their mind-set with single experiences that provide them with temporary feeling of happiness (Griffin 1986: 10). The author makes a proposal for formulating a theory of life quality based on informed desires, conscious choices, or, simply, people's businesses that are not necessarily connected to material aspects of life. He contributes an approach grounded in prudential values, which give us basic standard for evaluating numerous (everyday/mundane) lives of people. They make it possible for us to, with a certain generality, state how good a given life is, how it could be improved, and, how it compares to other lives (ibid.: 119). The author believes that the core of prudentially valuable object is its impact on improving life in a generally understood manner, in a way that refers to human life on the whole and not to a single person's life (ibid.: 27). This commonality of values and orientation towards others is also underlined by Ludwig Wittgenstein who claimed that people are unable to show mutual understanding unless they share specific core values. The majority of those values concern mutual humanist perception and building social relations.

This last perspective was confirmed by Anne Bowling's study (1995) when respondents were asked to list the most important elements that shape life quality completely on their own. Relationships with friends and family have been scored the highest, followed by one's health, health of family and friends, and, finally, financial standing and materially-conceived life standard placing fourth. The two issues worth noting are the fact that the respondents assigned significant value to health, and, that material component was only ranked fourth. Similar results were obtained by Robert J. Rogerson, Allan M. Findlay, Ronan Paddison and Arthur S. Morris in their study conducted in Scotland and England. The following factors impacting well-being were stated among those most important: low crime levels (for both violent and non-violent crimes), good healthcare, clean natural environment (inclusive of pollution, climate, and access to scenic landscapes), housing (costs of private and public rentals, quality of communal resources), low level

of racism, availability of education, employment perspectives (with salary levels and commuting times), unemployment rate, living costs' level, availability of sport and leisure facilities, as well as places of consumption such as shopping areas (Rogerson *et al.* 1996: 38). British Office for National Statistics (ONS) has relied on this data for calculating **National Well-Being** (NWB). Aside for the widely used categories of natural environment, health, education, economy and finances (also denoted as living standard), or governance (aka democratic obligations), British research also employs broader specifications as to where one lives (satisfaction with residence, proximity of public transport or workplace, borough ascription), individual well-being (general assessment of one's life satisfaction, yesterday's happiness mark, population's mental health, etc.), and, finally and most importantly, relationships with others (satisfaction with family and social life, having a significant other/a friend that one can count on in case of serious problems). Sectional results for each subcategory are annually published on the website of the ONS: http://www.ons.gov.uk/ons/guide-method/user-guidance/well-being/index.html (access 18.02.2014).

Meanwhile, the Canadians have been developing a grassroots non-governmental initiative that uses a specific list of "Canadian values", which, among others, include community engagement, sense of fairness, diversity, equality, inclusivity, and (economic) safety. After 10 years of large-scale research, they have arrived at the **Canadian Index of Well-being** (CIW), consisting of the following eight categories: community's vitality, democratic/civil obligations, education, environment, population health, leisure and culture, living standard and time spending patterns. Detailed descriptions of the different subareas of the index can be found on the website of the institution that continues this research today – the Waterloo University at https://uwaterloo.ca/canadian-index-well-being/ (access 9.02.2014).

Another measurement not too different from the Canadian indicator is the **Better Life Index** (BIL), developed by The Organisation for Economic Cooperation and Development (OECD). It is available as an interactive tool at http://www.oecdbetterlifeindex.org/ (access 19.02.2014) and delineates evaluations done within the 0-10 range for the eleven factors across 34 member states. The factored areas concern housing, income, employment, community, environment, governance, health, life satisfaction, safety, and work-life balance. The data used for estimations of results originates from quantitative OECD database and are outlined by specific dimensions at http://stats.oecd.org/Index.aspx?DataSetCode=BLI (access 19.02.2014). It is there when one can find out that "community", for example, signifies responses to the following question: "Had you get in trouble, would there be friends or family you can count and know that they would have helped

you when you needed them?" , succeeded by a percentage number of people who have positively answered that question. For Poland this proportion is 91% and for Norway 93%. The primary source of the data is here noted to be the global Gallup survey described earlier in this chapter.

The perspective of local communities is addressed by the European Council's **SPIRAL** tool which details nine core areas. These are: access to key resources, immediate surroundings, private relationships, social relations, relations with and between organizations, personal balance, social balance, feelings of well-being and ill-being, attitudes and initiatives (https://wikispiral.org/ access 19.02.2014). Each of the elements consists of several factors (totalling 67) which together use data derived directly from the residents. Local meetings are organized in small groups (6-12 participants) and attendees are asked three to four simple questions: How do you understand the notion of well-being? How do you understand ill-being? What are you doing or could be doing for everyone to experience well-being? How do you understand the well-being of future generations? Post-it notes are used, so that every participant can separately and anonymously answer the questions. Next, certain aspects are randomly selected for a group discussion. Each factor is then presented to the group, any necessary clarifications are made and approval process is initiated to ensure that group's vision is expressed. This bottom-up approach is very interesting, as it incorporates the voices of male and female residents and is then used for them, building a life quality awareness that is refracted by social mirror of a given group.

A directly expressed category of gender is absent from all of the above discussed indicators. However, British "The Economist" weekly has featured gender in their 2005 conceptualization of the **Quality of Life Indicator** (QLI), primarily resulting from the work of Economist's Intelligence Unit. Among the results presented for 111 countries of the world, Poland can be found at 48th place, while Norway has been ranked 3rd (The Economist 2005). The quality of life determining factors have been here marked as: material life quality (GDP per capita and PPP in dollars), health (life expectancy), political stability and security, family life (divorce rate per 1000 population members converted into an index with values ranging from 1 to 5, where 1 is the lowest and 5 is the highest indication), social life (fictitious variable with an assigned value of 1 in countries where high proportion of the population either attends church or belongs to labour unions, otherwise 0) , climate and geography (latitude for differentiating countries with cold versus warm climates), job security (unemployment rate), political freedoms (scaled from 1-full freedom to 7-no freedom), and the most important issue for this work – gender equality (gender pay gap data released by UNDP). In regards to the earlier-presented indicators, QLI does not appear to be particularly complex as far as using partial data is concerned. However, results which are obtained here do not

constitute a major departure from the findings released by neither HDI nor the Gallup's Institute.

It can be observed that broadly understood health is playing a crucial role as a component in the measurements discussed thus far. This approach is characteristic of all quality of life indicators that are based on the definition formulated by the World Health Organization in 1946 and stating that health is a full physical, mental and social well-being rather than a lack of disease or disability (WHO 1946). Successively, WHO has launched a global campaign thriving towards an approval for the concept of health to be formulated as such, later on expanding the notion to include autonomy. Designed in 1991, the WHO Quality of Life Indicator covers all those aspects of analyses, while at the same time making references to the cultural contexts and societal value systems (**WHOQOL** 2012). The indicator comprises four basic areas of physical and mental health, social relations and environment. At present, two versions of the tool are survey questionnaires with 120 questions under 38 categories for researching HIV, 100 questions on the life quality alone, and 32 additional questions on spirituality, religiosity and individual beliefs. Both can be viewed at http://www.who.int/mental_health/publications/whoqol/en/index.html (access 17.02.2014).

Another important theoretical contribution, relevant for both health and social perspectives, has been put forward by Lisa Berkman and Thomas Glass with a model of upstreams and downstreams based on social networks theory (Berkman and Glass 2000). The authors claim that social network structure is largely responsible for determining individual behaviours and attitudes, since it shapes the flow of resources that facilitate or restrict those behaviours (ibid.: 140). Simultaneously, they indicate that support from network's side alone may not be sufficient for preserving good health of network's members (people addicted to drugs being one illustrative case). Under this scope, the role of external stream, macro-level social and cultural factors, which can shape the network structures and provide necessary resources, is of great importance. The health-impact of different factors is divided into four areas: cultural (inclusive of norms and values linked to cooperation and conflict), socio-economic (covering i.e. poverty and inequalities), political (including social policy, political culture and opportunities for political participation), as well as social change (dependant on the urbanization degree and economic cycles). The networks may be seen as meso/middle-level actor situated between macro-level factors enumerated above and the individual behaviour and health at the micro-level. They impact on persons belonging to a given networks in four possible ways: through granting social support; via social participation and belonging; by social influence (creating patterns to be followed, norms and reference groups); through access to resources and material goods understood as constitutive for social and cultural capital (Bourdieu 1986).

It was illustrated in this section that social approach, including networks theory, concentrates on collectivism, privileges and obligations towards other people. Henceforth, it limits individual freedom. At the same time, the value of social perspective is exceptionally high (this approach has been included in every single one of the indicators and theoretical models described here), paving way for its specific contribution to the betterment of health in a given population, as well as general positive effect on the quality of life of its members.

Quality of life and medicine

The quality of life indicators are often consulted when medical decisions on prescribing certain medication to certain people, determining which patient might need surgery, and who is a candidate for a cessation of expensive life-support equipment's use, are made. This approach causes moral and ethical controversies as being based on financial calculations, yet it continues to be applied in some countries. The **Quality-Adjusted Life Years (QALY)** measurement is most often in use, stating a number of years of life gained thanks to a medical intervention in question, adjusted for the subjective well-being assessment. Multiplying these two values results in a ratio whereas the latter value is taken from a 0 (death) to 1 (full health) scale. It is worth noting that when life quality is improved significantly, the QUALY indicator will have higher value, even if a life might only have been extended by a relatively short period of time. Having said that, it is the residents, who are also patients in a given area, who should be the ones deciding on setting the priorities within healthcare treatment. American state of Oregon is a good example of a place where healthcare scope is decided by public debates gathering constituency, doctors and politicians, rather than by pharmaceutical companies, politicians and medical professionals, as it occurs in Poland (Leszczynski 2007). **Disability Adjusted Life-Years (DALY)** is a second health-related index, pointing out the years lost in result of health damage or untimely death that are characteristic of a given population. DALY is calculated from adding lost life years to years of living with disability, with a mention that 1 DALY equals a loss of one healthy year of life. This measurement is particularly applicable for discovering causes of harmful occurrences, allowing for tracking and registering effects of disease and injuries, as well as facilitating evaluations of the effectiveness of the already taken preventative measures (Wysocki, Sakowska and Car 2005). Nevertheless, whether disability or illness significantly decreases individual's quality of life does not depend solely on the types of harm incurred, but also on other, mainly social, factors which impact on community inclusion or exclusion of an individual in question.

Poverty and exclusion

A vast majority of poverty indicators usually evaluates poverty phenomenon in accordance with a minimal amount of money that an individual needs to survive. It does not, however, consider relational factors like citizenship, social needs and access to resources that can guarantee fulfilment of both the objective needs, and the subjective desires (relative factors) at a given time period. First definitions orientated towards relative perceptions of social inequalities have begun from a claim that poverty is nothing else but a lack of resources required for a satisfactory participation in the everyday social life (Abel-Smith 1965, Townsend 1967). Today, we can observe multiple approaches to measuring poverty, including those income- or spending-oriented, focused on access to resources or their usage, and individually- or household-driven. This notwithstanding, the perspective delineated at the beginning of this paragraph remains absolutely predominant. **Multidimensional Poverty Index (MPI)** is among global measurements that go beyond material perspective, being based on the very same dimensions that those used in HDI (health, education, living standard). Similarly to the HDI, it has also been developed by the United Nations Development Programme (UNDP), having been around since 2010 and replacing the earlier employed Human Poverty Index (HPI). The data considered here pertain to child mortality, malnutrition of children and adults, years of education (at least five per every adult resident), children's education (present school attendance up till the 8th grade), fuel type (family experiences deprivation if they use manure, wood or charcoal), sanitary conditions (unsatisfactory if they do not meet standards outlined by the Millennium Development Goals (MDG) or if bathrooms are shared by multiple families), drinking water (access delineated by MDG, water source situated not further than 30-minute return walk away from the household), electricity, type of flooring (unsatisfactory if threshing floor or sand), possessions (deprived household has neither of the following: radio, television set, telephone, bicycle, motorbike, fridge; nor a car or a truck is owned). A household is considered to be impoverished if it does not meet at least 33.33% of the conditions stated above (UNDP 2013b). This indicator only considers extreme poverty with minimal survival needs of clean water or solid flooring, and is unsurprisingly applicable to the developing world context. Comparatively, the m**inimal existence** indicator calculated in Poland delineates at what point biological emaciation is said to begin and takes into account categories like: alimentation (estimated at around 200 PLN per person per month), housing (at circa 250 PLN per person), minimal education (3PLN monthly for a younger child, 50 PLN for an older child), clothing and footwear (17 PLN per person), medication (10 PLN), cleaning supplies (16 PLN/person) and other expenses (25 PLN per person) (Kurowski 2013). Only a household finding itself below this line

(which applies to 6.7% of Polish households) can seek state welfare support. It is crucial to note here that public discourse is dominated by a liberal split between "poverty" – a mark that has unanimously negative connotations and is seen exclusively through the absolute categories (poverty line, existential minimum), and "social inequalities" – connected to income (re)distribution and often viewed as acceptable element of the current economic and political order (Lister 2007: 26-27). Under this framework, there is no room for comparing the impoverished with other people living in the same society at the same historical moment, which could lead to uncovering different, relative dimensions of poverty. Sociologist Peter Towsend has underlined a need for distinguishing the two concepts of poverty (linked to income and immediately accessible resources) and deprivation (concerning the level of experienced conditions and actions that can relate to material and social dimensions alike) (Townsend 1987: 127). The former concept has been already discussed, while the latter can be referred to through three approaches characterized by such perspective: civil obligations, socially defined needs, and unacceptable level of inequality. The first perspective assumes that an individual does not have sufficient resources to fulfil his or hers obligations as a citizen. Second approach is linked to social needs (see THN discussed above), which have been defined as lacking possessions considered basic by a given society and inability of taking actions normally considered obvious, such as getting a job (Gordon 2000: 52). Third and final perspective delineates social agreement in regards to proportion of income averages' level that become unacceptable due to inequality (here research usually shows levels much higher than the officially outlined existential minimum). An interesting study on this topic was World Bank's inquiry into measuring **inequality of economic opportunities** across six countries in Latin America, which additionally expanded the very scope of the definition (Ferreira and Gignoux 2008). The inequalities found have illustrated three key factors, namely salaries, household income and household consumption per capita. The differences found were analysed in reference to specific information on household members and included categories of gender, race or ethnic origin, place of birth, education levels of both parents and father's occupation. One of the conclusions presented by Francisco H. G. Ferreira and Jérémie Gignoux was to indicate great importance of family origin and, more importantly, level of maternal education for the inequality of economic opportunities. The latter – mother's education – was responsible for the total inequality at the 9-12% rate. Finally, the authors elaborated on the fact that inequality of opportunities is not greatly linked to gender in Panama (0-1%), yet has much bigger impact in Guatemala (5%) (Ferreira and Gignoux 2008: 19). Details on the methodology of this approach, sources of data and results for each country can be found in tabulation given in the volume. The patterns of information

coding and calculations, especially those pertaining to correlation between gender and total inequality can certainly be helpful in developing the GEQ indicator.

Comparative matrix of indicators and summary

In recent years, linking individual and social approaches has resulted in significant research projects and emergent designs of various quality of life indicators. As demonstrated in this Chapter, the indicators were reflective of different goals, such as underscoring health-related well-being, scale of poverty, opportunities, development and many others. Their scalable applicability varied in regards to coverage of individuals, groups or entire populations. In general sense, they have all corresponded to certain universal factors, which, while they might have been differently called, are presented in a comparative manner in Table 1 below. I have selected thirteen measurements from the portfolio of instruments discussed in the Chapter. Rather than naming the areas they describe and can in fact serve as examples in the GEQ indicator development, I have used pictogram representations for column headers, while the original names of the indicators given in the text can be found in the subsequent rows of the first column.

Table 1. Summary of the quality of life indicators (dependant on the analytical aspects included)

								$		
Gallup-Healthways Well-Being Index™	physical health	emotional health	pro-health behaviours	basic access	-	-	work environment	-	life evaluation	-
Basic Capabilities Index (BCI)	reproductive health	-	-	child mortality	education	-	-	-	-	-
Human Development Index (HDI)	life expectancy	-	-	-	literacy	-	-	gross national income per capita	-	-
Index of Sustainable Economic Welfare (ISEW) and Genuine Progress Indicator (GPI)	healthcare expenditure	cost of violence and unemployment	costs of air and water pollution, noise costs	consumption of durable use goods, state investments	educational expenditure	natural environment	urbanization, traffic accidents and commuting costs	net capital gains, foreign investment balance	-	unpaid work
Genuine Savings Indicator	-	-	-	capital necessary for long-lasting resources production	education expenditure	depletion of natural resources and environmental pollution	-	gross savings	-	-
Value Aggregators Method (MAW) and Social Diagnosis	healthcare protections	mental well-being, stress, social capital	leisure, cultural participation, lifestyle	food, clothing, housing, transport, social welfare.	education, children's education	-	employment	wealth-generated income, personal finances	aspects of social exclusion, values and norms system	causes of low fertility in Poland
National Well-being (NWB)	health	governance, relations with	-	where we live	education	environment	what we do	economy and finance	individual well-being	

		others								
Canadian Index of Well-being (CIW)	population health	social vitality, democratic rules	leisure and culture, time spending patterns	-	education	environment	-	living standards	-	
Better Life Indicator (BLI)	health	community, civil engagement,	work and life balance.	housing, security	education	environment	employment	income	life satisfaction	-
SPIRAL	-	immediate surroundings: personal and social relations, attitudes and initiatives	personal balance	access to key resources	-	-	-	-	social balance, well-being level	-
Quality of Life Indicator (QLI)	health	family life, social life	-	political stability and safety, political freedoms	-	climate, geography	work security	material quality of life	-	gender equality
WHOQOL	physical health	mental health, social interaction	-	-	-	environment	-	-	-	-
Multidimensional Poverty Index (MPI)	-	-	sanitary standards	child mortality, malnutrition, type of cooking fuel, drinking water, electricity, flooring type	completed years of education	-	-	resources	-	-

The indicators discussed in this Chapter do not cover the entirety of the existing theories and measurements dealing with quality of life. In my selection, I have tried to pinpoint the most important theoretical contributions to the topic, particularly relying on David Philip's work in the „Quality of Life. Concept, policy and practice" volume (Phillips 2006), subsequently supplying examples of indicators that could be useful in the future research into GEQ indicator. What needs to be underscored is that only a limited number of measurements take into consideration gender identities and gender equality as important areas that influence individual and social well-being. Therefore, more work on this theme is needed. In Chapter 3, the indicators that strictly refer to gender equality will be outlined. Regrettably, those largely do not reflect on the issues of life quality. Before that, however, I will return to social development-led theories of happiness in Chapter 2.

2. Social development and the happiness concept

Social development theory refers to social changes and their qualities, which enable societies to better organize their tangible and intangible resources to respond to the challenges and opportunities they face (Jacobs *et al.* 1997). These social changes can transform existing social order, which manifests in social relations, values, behaviours, institutions, but also in nature. Transformations begin through stimulants such as systematic factors (characterized by continual dynamic) and/or random, unique factors (e.g. weather or population changes). We might discuss here the sources of alterations but accurate observation could be that social changes are continuous in nature. Niklas Luhmann perceives "a property of social order, known as change" (Luhmann 1984: 471). That remark can be as well distinctive for social and cultural roles performed by women and men within a society. The actions taken by both genders can nowadays convert or overlap in a result of a process started by the mass movement like three waves of feminism (therefore casual factors), but also through day-to-day practices.

Social change

Hans Haferkamp and Neil Smelser identify three main elements of social change: its structural determinants (like random occurrences), processes and mechanisms (e.g. movements and conflicts), and finally its directions (including effects and consequences) (Haferkamp and Smelser 1991: 3). The societies themselves are very diverse and those varieties of interests, as well as of "doings" and "beings" (see Amartya Sen capabilities approach in previous part of this study),

often leads to contradictions and conflicts. In a way those culture lags can play a role of a triggering mechanism of social change, but also they can be destructive. The evolution of a change might go in the innovative but risky direction or can be stabilized and preserved closer to the *status quo*. Determinacy of the final stages of change as well as its process is debated by social scientists. However, it is good to keep in mind that although traditional models of development survive, other phenomena also come to the stage e.g. paradox, pathology and decay (not only growth) (Elias 1985). Therefore work on gender issues (e.g. women's empowerment and share of reproductive work) might include persistent patterns of structural and cultural changes like differentiation (specialization), integration and conflict, and can lead to upgrade on the one hand, but to decline of women's rights on the other. These changes can have a revolutionary, sudden course, or take slower reformatory way. That depends on bond and resonance of the topic with culture, which plays an arbitrating role in every society. Culture changes may manifest in modifying prospects, beliefs, motivations and moods of certain communities or even whole society in these two ways. Both, sudden and gradual conversions, however, might be equally effective. E.g. changes related to gender roles imposed by law (reformist course) can influence social consciousness. Thus, the official introduction of shared paternal leaves (between mother and father of a child) can increase the support for fathers as child carers. On the other hand, mass protests of single mothers in Poland as reaction to governmental austerity policies and liquidation of the maintenance (alimony) fund in 2004, resulted in its restoration in 2007 (Gazeta Podatnika 2007), which shows that radical bottom-up steps can also be successful. Hence, culture understood as symbolic acts and discourses in the public space, which involves and is directed to the audiences in that space (Warner 2002), is not only subject to change but also to the discursive production. Content and discourse analysis of debates, texts, rituals, formal and informal talks provide a picture of importance or lack of importance of topics such as gender issues for different groups of society. These groups could be political organizations, religious minorities but also subversive informal groups (Haferkamp 1975). If their voice is heard, the phenomena of culture production can be used by them effectively, creating opportunity for sake of women as well as men and their performed functionings. Certainly, the culture changes are also rooted in class division, religion, law, morality and values. Altogether they create increasing complexity of society and construct collective or individual attitudes of its members that, in turn, influence their subjective well-being. This interpenetration of concepts of cultural and society changes can be exposed in the processes and mechanisms of these changes, the patterns of innovations they produce, or the directions and consequences of

these changes. Culture and its ideas (including ideas of equality and freedom) can operate differently in various social settings (Eisenstadt 1970). Therefore, the concept of gender equality works out otherwise in Poland and Norway, which is bound to different historical contexts and people mentalities (that also could be a subject to change over time).

Social development

Innovation, intensity and speed of acceleration of these changes undoubtedly influence social development. Different theories refer to such characteristics as: efficiency, productivity, effectiveness, complexity, creativity, accomplishment and enjoyment (Jacobs and Asokan 1999: 152), which are associated with individualism of *homo economicus*. Society seen in these terms (hedonistic individuals maximizing their utilities) needs much of the resources for its progress, such as supporting infrastructure, capital and technologies. In this highly fragile and unstable environment new ideas must evolve and compete. At the same time, new types of social organizations emerge (flexible units) which harness skills and social energies to take occurring opportunities to achieve better results. However, social development arises from certain motives people have. The forces that drive their actions can be e.g. their values, skills, attitudes, aspirations and information, which all allow individuals to assess their current status and imagine future possibilities. With the ability to plan, people do not only focus on survival, but also on growth, development and evolution, trying to improve their living standards. Nevertheless, as mentioned in the first part of this study, people's desires are limited to the frames they can visualize (after Lacan 2006) and they have to learn how and what long for. That is why the education plays a key role in their improvement. Formal and informal training help to transmit the collective knowledge and experiences from one generation to the next, enabling people to deal with challenges and opportunities they face. This knowledge gathered in the past equips societies also with mental models, symbols, acting strategies, perceptions and values, which they might submit or question. Gender as a social construct is a subject to many reflections bound with these various types of knowledge and need of their further dissemination or oblivion. In this case, undoubtedly, increasing awareness is a precondition of change. To devise new ways and means to enhance well-being not only the opportunities have to be seen, but also the pioneering work must be done (Cleveland and Jacobs 1999). Here I see the role of GEQ project. Pioneers take new topics and ideas and introduce them into practice by carrying different initiatives and getting into new habits of mind and action. But these changes are not initiated without objection. Conservative members

of a community initially oppose. However, they might be convinced if the innovations are accepted, organized and imitated by the others, and especially if they lead to the improved living standards of those that conformed. Pioneers have to take into consideration the fact that brought up change might simultaneously influence not only social or physical levels of living, but also may interfere mental and psychological spheres. Therefore, the workload the society has to carry out to deal with new inventions or ideas might be substantially larger than initially assumed. At the beginning new ideas can be welcomed with indifference or be ridiculed, but often growing success leads to temptation of others to imitate the practice, therefore it becomes assimilated and institutionalized. For that the supportive systems and facilities are necessary. Often it is said, that innovations need the right time and place to be adopted. History shows many brilliant ideas which appeared too early to be implemented or were rediscovered after decades, when the necessary infrastructure was constructed (Carrington 2006). That means not only physical base but also new laws, regulations, new systems and organizations. They can all facilitate (or hinder) the advance and, what is important to notice here, they (or their accommodation) can be designed. That is why, when the goal of this project is achieved and the new equality indicator is drafted, the critical reflection over existing and required organizations in the environment that can support its practical and effective implementation should be mapped. Last unit that must be taken into account in the learning process is the family, as a miniature version of larger society. Social values and personal believes are transmitted in this way between the generations. Young ones in their adult life mirror what they intuitively learned or seen (like e.g. house and care-works division between women and men). They are able to restrain themselves in the name of larger good or future incentives or overspend; they can compete or cooperate, act opportunistically or be oriented towards others etc. These social behaviours and responsibilities they learn contribute to their life views, including perception of happiness. Thus, social development is so important, but not necessarily defined by *homo economicus* conduct.

Social development perceived as leading to growth has also limits. Mainly they are noticeable in scarcity of natural resources, necessary for production of goods. Second pejorative aspect of such approach is that policies and strategies that focus on growth may lead to the increase of inequalities (e.g. when only certain groups within society profit) and *de facto* reduction of average living standard. However, resources include also humans and their social and natural environments as well as their mental powers. The role of non-material resources raise as development advances and access to information is eased (among others Internet plays such role).

In that sphere the obstacles to development can be: the limited perception, called as well "perceptual walls and apparent dead ends" (Jacobs, Macfarlane and Asokan 1997), out-dated attitudes and anachronisms. These barriers concern fears associated with unforeseen consequences of development of new technologies, employment changes, population growth etc. that for some seem to be opportunities, but for the others threats to the society's future destiny. In general, errors occur when the projections of future performance are calculated on the basis of historical trends. Thomas Malthus with his population growth theory can be seen as the best example in this matter (Malthus 1925). The dead ends might not appear at all due to new discoveries. Outmoded attitudes, often related to distrust and fear of the unknown, as time goes by often appear to be groundless. They can be best portrayed by the resistance of peasants in former centuries to education, arguing that reading and writing is irrelevant to their lives. If the anachronistic habits have had still their momentum, we would be forced to keep our savings in gold or other metals. Instead, acceptable banking system has developed. Finally development is a human process that causes economic and social advancement. But it is not only limited to planned political strategies to achieve outcomes in these fields only. It can also have positive (or negative) effects on happiness, which view will be elaborated below.

Happiness

Happiness or the mental state of pleasure is a utility. Contrary – pain and suffering can be defined as disutility. David Phillips indicates that:

> a utilitarian society is one which strives to achieve the greatest happiness of the greatest number of its citizens. Two aspects of utilitarianism are central to discussions of quality of life. The first is at a theoretical level and is related to notions of values and desires. The second is at a practical level and relates to measuring utility in the material world. (Phillips 2006: 62)

As I have mentioned in the first part of this study, the research on subjective well-being (SWB) showed that there is a strong correlation between happiness and peoples' physical and mental health. Therefore, indicated by Phillips heading for greater happiness of a society does not require special justification. In this approach the central place is taken up by individuals and their self-assessment of utility, which emphasize people's autonomy, dignity and integrity. But the introduced perception of values and desires can differ for various society groups, countries and regions. It has to be taken into account that nowadays global pressure of consumerism also influences people individual perceptions of fulfilment and creates new desires, often bound with

the material affluence. That stance turns people away from reflection on what they actually do in their lives whether it has a meaning or value, and after all if it's well worthwhile. Thus, further question in that framework concerns measurement of happiness – should it be only calculated by the purchases we do (assuming that happiness is getting what we want)? Such approach was undermined among others by posing the question if utility can be actually inferred from purchase and consumption (Kahneman *et al.* 1997: 375)?

Other attitude demonstrates the worldwide network of social scientists that since 1981 has carried research on changing values and their impact on political and social life. **The World Values Survey** (WVS) conducted in more than 100 countries shows that changes are omnipresent in all studied fields: gender roles, tolerance of other groups, social capital, political participation, good governance, democracy, religion, work motivations, environmental protection and subjective well-being (World Values Survey 2008)[2]. Studied countries were situated along two axes, one representing traditional – secular/rational dimensions (which concerned mainly importance of religion for respondents) and second survival – self-expression values. Authors came into number of conclusions, among others that:

> [s]ocieties near the traditional pole emphasize the importance of parent-child ties, deference to authority and traditional family values, while rejecting divorce, abortion, euthanasia and suicide. These societies have high levels of national pride, and a nationalistic outlook. Societies with secular-rational values have the opposite preferences. In nearly all industrial societies, worldviews have shifted from Traditional toward Secular-rational values. But with the rise of the knowledge society, cultural change moves in a new direction. The transition from industrial society to knowledge society is linked with a shift from Survival values toward Self-expression values. (World Values Survey 2008: 6)

To some extent this focus on religion explains Polish context and traditional values represented by part of a society. Still, the predilections of the other part, as predicted by the WVS, have moved towards tolerance and trust. Turn of the recent decades from survival to the self-expression values is bound with shift from worry over economic and physical security to emphasis on subjective well-being. People who have gone that way usually give priority to gender equality, environmental protection, tolerance of migrants as well as people of other psycho-sexual orientation. They also claim higher participation in decision-making in political and economic life. Thus, in those societies emergence of democratic institutions can be observed (strong correlation between mass self-expression and effective rights). All these characteristics were reflected in the well-being indexes

2 Questionnaires from all six waves of research, as well as collected data in various formats (SPSS, SAS, STATA) can be downloaded from the WVS website: www.worldvaluessurvey.org (access 08.03.2014).

presented in the first part of this report. What is typical for that group of a society is the inculcation their children with imagination and tolerance as important values. As demonstrated in the previous paragraph the family as a transmitter of values plays the key role in social development and it cannot be underestimated. Authors stress also significance of three elements of human development: action resources (material and cognitive resources, including education and skills helping to govern people's lives), existence of mentioned democratic institutions and self-expression values (empowering culture). At the same time they warn to distinguish between effective and ineffective democracies (pseudo democracies). The conditioning factor in that case in not existence of electoral democracy but the decisive influence on government transferred to the people. However, further WVS emphasizes that:

> support for gender equality is not just a consequence of democratization. It is part of a broader cultural change that is transforming industrialized societies and fuelling mass demands for increasingly democratic institutions. Although a majority of the world's population still believes that men make better political leaders than women, this view is fading in advanced industrialized societies, and also among young people in less prosperous countries. (World Values Survey 2008: 10)

The link between the economic development and culture of tolerance and trust with the emphasis on human autonomy is accentuated by the researchers. According to them process of shifting from materialistic, survival values to post-materialist values promotes different kinds of emancipation from individual agency to gender equality and brings change from the xenophobic and authoritarian standpoints toward the increasingly tolerant and democratic views. Despite that observation, the authors admit that data from c.a. 20 countries show that from 1981 to 2007 there is almost no evidence of a convergence of values. Therefore, conclusions are not as plain as they might look at first glance.

The Centre for Bhutan Studies approached the topic of happiness in more holistic way by combining economic with psychological perspective. In a result **Gross National Happiness** (GNH) index[3] was created, illustrating nine domains: psychological well-being, living standards, health, education, culture, time use, good governance, community vitality, ecological diversity and its resilience (Ura *et al.* 2012). All these fields are equally weighted. Index includes 124 variables, however authors emphasize that not all of them need to be fulfilled to make one happy. As people have freedom of choice in which way they can make their lives fulfilling, this index has no universal applicability. Data is raised through periodic surveys, which contain the information about the

3 Index is calculated only for Bhutan, for more information see: www.grossnationalhappiness.com (access 09.03.2014)

respondents' place of living and its character (urban/rural), gender, age, occupation, income level etc. These dimensions can be analysed separately to discover the roots of unhappiness and to take steps to decrease the insufficient conditions of “not-yet happy” people. One of the examples showed in the latest report is the decomposition of GNH index by gender, which indicated that 49% of men and only one third of women are happy in Bhutan. Authors write in addition “[w]omen do better in living standards and ecology. Men do better in education, community vitality and psychological wellbeing. Men and women are about the same in health, time use, governance, and culture” (Ura *et al.* 2012: 58). Analysis of place of living dimension shows that in the rural areas the deficient conditions are mainly: limited access to education, lower living standards and lack of balance between paid work, unpaid work and leisure. In the cities “not-yet happy” people are missing in non-material sphere the community culture and vitality as well as psychological well-being. On the basis of a wide array of conditions GNH index classifies persons in four categories: unhappy, narrowly happy, extensively happy, and deeply happy. That helps to set the policy and programme screening tools, which have practical applications. As can be observed, GNH focuses on people's flourishing instead of their survival (that is most often the case of poverty indicators). On the basis of the collected data social scientists design policy guidelines to increase happiness and improve the situation of those “not-yet happy” groups. Taking into consideration a nuanced picture of the diversity and evolution of GNH across Bhutan the formulated recommendations is not only directed to government alone, but also to civil servants, business leaders, people in their personal lives and communities. All these groups are responsible for increasing happiness of the society. Therefore, GNH index is offered as a public good for every citizen for her/is reflection and contribution.

Happy Planet Index (HPI) is similar to GNH in its thematic coverage, but it is simplified to three main dimensions: life expectancy, experienced well-being and ecological footprint. It is calculated by New Economics Foundation (NEF) for 151 countries since 2006, the 2012 results are estimated for the third time (see website: http://www.happyplanetindex.org/data/, access 09.03.2014). The first variable is based on data taken from UNDP Human Development Report (life expectancy), second from Gallup World Poll (see the Cantril's Self-Anchoring Ladder method described in the first part of this study) and third figure is calculated by the Ecological Footprint tool promoted by the environmental charity WWF (for details see: http://footprint.wwf.org.uk/, access 09.03.2014). The first quantities are multiplied and then divided by the ecological footprint. NEF justifies that to create happy and healthy lives now and in the future the current scenario of

development must be changed towards more sustainable well-being that is why these variables were chosen to the formula. Quick look at the coloured world map at HPI web page give the impression that most countries in scale 0-100 (0 for unhappy planet/country and 100 for happy) achieve score below 50 (many even below 30), but authors set a target for nations to aspire to 89 by the year 2050. According to them it is attainable. Today “many high-income countries score low because of their large Ecological Footprints, the lowest income countries in sub-Saharan Africa tend to rank even lower because of low life expectancy and low well-being” (NEF 2014). Latin American countries score highest, however, we must be aware that some issues are missing in HPI. There is no reflection of human rights (bound with equality and tolerance conducts) or reference to democracy, which were important factors of social development in World Values Survey discussed above. That is why authors recommend using HPI alongside with other measures, which consider also means to achieve set objectives.

What characterises the HPI approach is the exclusion of materialist measures from the index (no GDP or standard of living variables). In that direction goes also Ernst Friedrich Schumacher, who presents framework of Buddhist economics (Schumacher 1989). Instead of materialist focus on goods, Buddhists are interested mainly in liberation. However, on the way to peoples' liberation stands their attachment to wealth (not wealth itself) and carving of pleasurable things (not enjoying them). The foundation of Buddhist economics are simplicity and non-violence, which in practical terms denotes utility of small means leading to the extraordinarily satisfactory results. Therefore, it assumes obtaining the maximum of well-being with the minimum of consumption (opposite to the neoclassical premises). That leads to the liberation of our mass-minded political imagination from the grim weight of compulsion to consume. According to Schumacher the current “industrial system which uses forty per cent of the world's primary resources to supply less than six per cent of the world's population could be called efficient only if it obtained strikingly successful results in terms of human happiness, well-being, culture, peace, and harmony” (Schumacher 1989: 127). As we observe, this kind of effectiveness is not taking place. Author provokes reflection on choices the societies ought to make in economic scope: between private ownership of the means of production and various types of public or collectivised ownership; between a market economy and various arrangements of 'planning'; between 'freedom' and 'totalitarianism' (Schumacher 1989: 305). At the same time he underlines that in reality they are not opposites but complementaries with preponderance on the one side or on the other. Since physical resources are limited, aiming at satisfying people's needs by modest means

can lead to less conflicts over goods and resources, as it would be in case of societies depending upon a high rate of their use. The same concerns living in highly self-sufficient local community. Such people are less likely to get involved in large-scale violence than those whose existence depends on world-wide system of trade. Therefore, it seems that Schumacher questions should be regularly re-considered by policy makers as well as all members of societies, to improve well-being not by greater consumption and resource use, but satisfaction from life and personal fulfilment.

The liberation concept discussed above assumes that people are able to self-reflect, as well as they have knowledge and control over their lives. To some extent it was true for Bhutan, once the happiest country of the world. But the inequalities increase in a global scale and when king of Bhutan Jigme Khesar Namgyel Wangchuck, educated in the United States and United Kingdom (Oxford University), introduced the satellite television into the country, the scale of crime increased. The pictures of the world seen in the television, achievable neither for Bhutanese nor for the majority of Americans, caused reduction of GNH of the society. People were trapped as many others all over the world, taught by the mass marketing what to desire that can bring them happiness but only if it complies with the American upper-class lifestyle, alluring bodies, clothes and goods as objects of aspiration. Additionally, high acceptance of violence in the mass media caused the increase in burglary and thefts in Bhutan, when the young people wanted to compensate the loss of the good feelings and they started to rob the shops (Patel 2009: 46-47). As human beings we are influenced and manipulated, that is why the true strength is to achieve utility, the mental state of happiness, by meeting our desires (not necessarily only material) via real-world experience. Community might help. Though happiness can be experienced deeply personally, striving for it is collective. Therefore, it cannot be measured only in narrow subjective well-being frames.

The discussion from the first part of this study concerning hedonistic and eudaimonic approaches also fits here. Already Aristotle disregarded hedonism as vulgar and looked for higher values (Ryan and Deci 2001). Further analyses showed that happiness and pleasure (hedonistic measures linked to desire fulfilment) does not necessary mean well-being and often is not even related to it. The eudaimonia appears when people's *personal expressiveness* (after Waterman 1993) is congruent and entangled with their deep values in which they are holistically or fully engaged. Such attitude is firmly related to personal development and growth, as well as to the realisation of one’s true potential (gr. daimōn). Richard M. Ryan and Edward L. Deci describe:

[t]he two traditions—hedonism and eudaimonism—are founded on distinct views of human

> nature and of what constitutes a good society. Accordingly, they ask different questions concerning how developmental and social processes relate to well-being, and they implicitly or explicitly prescribe different approaches to the enterprise of living. (Ryan and Deci 2001: 143)

Accordingly, individuals, who pursue satisfying or pleasurable aims, may create conditions that make more formidable the feat of well-being by others. However, deeper empirical research is needed to identify which factors that foster individual well-being can line up or be congruent with factors that facilitate wellness at collective or global levels.

Summary

Theoretical deliberations presented in the second part of this analysis demonstrate different approaches to notions of social change, social development and happiness. The critical reading showed that concept of social development to much extent is related to neoliberal framework of growth, which in turn was juxtaposed in above text with the happiness theories and indexes, not necessarily meshed with material affluence. Social changes take place constantly in all cultures of the globe. However, the condition of higher well-being of a society should be increasing prosperity of all its members, especially those underprivileged. Among that group very often women are counted, hence the third part of this study will be dedicated to them and to the problem of gender equality.

3. Gender equality from an analytical perspective

Richard Wilkinson and Kate Pickett observe many negative effects of inequalities on society and individual well-being (Wilkinson and Pickett 2009). In their study they focus on relationships between Gini Index and various social problems to explain how quantity of income disparities between 20% of the richest and 20% of the poorest households is connected to the occurrence of different phenomena e.g. violence or health problems. Accessible data from diverse fields enabled them to prepare countries comparison demonstrating that there is close link between income inequality and “level of trust, mental illness (including drug and alcohol addiction), life expectancy and infant mortality, obesity, children’s educational performance, teenage births, homicides, imprisonment rates, social mobility” (Wilkinson and Pickett 2009: 18). Further analysis explained the influence of status dissimilarities understood as a characteristic of social structure on individual life. Individuals define themselves (their income level, social and class status) in comparison with their social environment. To avoid shame (an essence of social emotions) people are often trapped

like Bhutanese in the consumption paradigm, buying goods which are determinants of high social status. Moving up the social ladder means to feel pride, dignity and have high self-esteem. To appear attractive, interesting and competent to others. The fear of not being able to mirror that picture let the people to adopt self-defence strategy and build their self-confidence on the basis of egocentric self-promotion. According to the authors the increase of narcissism is bound with rise of anxiety and suffering from depression. In that case high self-esteem goes not hand in hand with real achievements, happiness and ability to take criticism, but often leads to aggression, racist views and lack of social conscience. However, not only low social status causes the stress. The other anxiety sources are lack of friends and stress in an early life period. Friendship has a protective effect, but it is more and more difficult to build one in a disintegrating and fluid society. Nowadays, the kinship and geographical bonds are loosely defining ones identity to much extent left open in an anonymous environment. All these aspects enfeeble social life, weaken mutual trust, cause violence and lower the status of women. The societies with higher inequalities seem to be more 'masculine' in stereotypical understanding of masculinity and femininity. Scientists from Harvard University show that this 'masculine' character reflects in lower women participation in politics, their employment and income, as well as social and economic autonomy (Kawachi *et al.* 1999). In the USA in states with higher income disparity women rarely vote, perform important political functions or finish their studies, and their incomes are lower than men. In international comparison more egalitarian countries have more women in legislative bodies, the income gap between woman and men is narrower and the number of women with higher education diploma is prominent. Despite the fact that there are some deviations from that correlation (e.g. in Italy and Japan, where the status of women is lower than expected, what is determined by the strong patriarchal traditions), status of women is important to all women all over the world, despite their material status. Wilkinson and Pickett claim that the way to raise it leads through the decrease of income inequalities. That step would allow also rebuilding trust, social bonds and lifting the well-being of all people, not only women.

Gender equality

The Nordic countries define the objective of gender equality as “human beings, women and men, should have equal rights, obligations and opportunities in all fields of life” (Nordic Council of Ministers 1995: 10). They justify further that dissimilarities between women and men must not lead to inequalities of status or treatment in any society. Literature dedicated to this topic refers to

different fields of gender equality: profits in basic living conditions, production and property rights, family structure and household, social roles and positional empowerment, political representation, participation in civic actions and sexuality (Agassi 1989; Alexander and Welzel 2007; Salem Press 2011). They are related to various disciplines, among others economy, sociology, anthropology, psychology, biology, but most often cross the disciplinary boundaries. Although the historical gender roles' norms are changing with the development of societies, to large extent in all above mentioned fields inequalities persists.

In many countries women are better educated than men, but still they neither have equal access to high positions in public and private sector, nor specialist jobs (especially engineering and IT posts). They run up against barriers beginning with private questions at the recruitment process, through lower remunerations, fewer chances for promotions, ending up on exploitation (precarity) and flexible working hours. Very often women have lower assets than men or they live in poverty. Gender inequalities are not only visible in public and professional spaces. As mentioned in previous paragraphs, women lack support in their private sphere, where they are burdened with most of the unpaid houseworks. Stress and heavy (productive and reproductive) workload affect their health, concentration and well-being. Additionally, more often than men they experience violence, are intimidated or harassed. They have lower chances than men to live their lives without fear or in satisfying relationships. These conditions cause worries about their and their families' future. This state of living under stress in time poverty becomes a norm instead of a good standard of living. To realize their intellectual and cognitive potential they need active support and created capabilities (after Nussbaum 2000). The inability to communicate their needs (no voice in political and professional spaces) leaves them invisible. Therefore, they cannot be answered in an effective manner. All these aspects influence women physical and emotional states and give them lower chances to fulfil their individual and collective abilities. Therefore, social, economic and political inequalities work at the disadvantage of the whole society and economy. To change that situation not only equal opportunities strategies are required but also active efforts of the whole society. Ronald Inglehart and Pippa Norris point at the main factors of raising tide of gender equality: social and economic development, involvement of state designing policies and structures to strengthen women's rights and opportunities, historical legacies and raising gender-egalitarian attitudes resulting from cultural norms, values and believes (Inglehart and Norris 2003). Authors also point at actors that can accelerate or retard equality trends in the societies: “social movements, NGOs, and coalitional networks organized by feminists and by their opponents; intellectual developments

conveyed by seminal theorists, the mass media, and academe; and the impact of the policy process, including government leaders, parliaments, and the courts" (Inglehart and Norris 2003: 149-150). All of them first try to collect arguments and describe existing inequalities to form a basis for social and political actions.

However, there is no universal way or united tradition of freeing society from gender domination and oppression. Feminist studies point at least at three different visions of gender equality that are translated into different political strategies (Walby 2004; Verloo and Lombardo 2007). First concept is related to achieving the equality understood as sameness, which is often associated to the strategy of equal opportunities, thus to the process of women's inclusion. This strategy, however, was criticised by not challenging the underlying male norm and dominant patriarchal values (women have to either imitate or be compensated for not reaching (Mackinnon 1987)). Second conceptualisation concerns strategies affirming differences from male norms and values, and focuses on reversal which can be realized i.e. by organizing positive actions of establishing the criteria for employment, participation in decision-making and promotions for women. In this view radical and cultural feminists propose to reconstruct the political by seeking recognition of women's non-hegemonic gendered identities, different to male normative identities and cultures (Ferguson 1993; Squires 1999). Third approach concentrates on transformation of existing female/male norms and standards, which can be achieved among others by application of gender mainstreaming strategy. This displacement vision, promoted mainly by postmodern feminists, shows the world as a gendered place, constantly changing, where dilemma between equality vs. difference is only on the surface of this complex issue. To deconstruct political discourses on that subject the incorporation of gender into the mainstream and adoption of diversity politics are needed. Hence, the process of continues questioning of established meanings and categories in the mainstream and gender theory can take place to respond to rapidly changing environment (Squires 2005; Walby 2005). These three concepts are still contested and debated, but the political activities rather pragmatically homogenize diversity under a dominant norm or build "strategic framing" to include gender equality as a common and accepted goal and enter it into the policy agenda. Yet, to do so, the existing gender inequalities and their historical changes must be defined and measured. One way to achieve it is to use the existing or to built new gender equality indicators, which is a goal of "Gender equality and quality of life" research project.

Gender indicators

Gender-sensitive or gender-responsive indexes are usually designed to measure and asses changes in specific conditions or progress towards defined gender-equality objectives (CIDA 1997). Such indicators can include variables based on quantitative, statistical data disaggregated by sex (i.e. level of poverty or participation), as well as capture qualitative information like patterns of changes of attitudes towards gender equality or relations between women and men (participatory methods are desirable). Combination of both, quantitative and qualitative methods enables to 'triangulate' achieved results and to make cross-check of data, which helps to avoid distorted findings and conclusions.

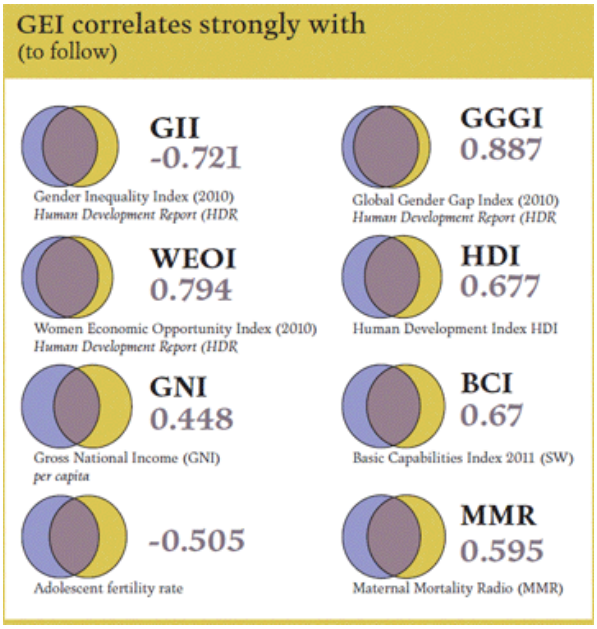
There are different reasons for construction of gender indicators. The most often they are used for diagnosis of the women's situation on the ground and collecting evidence to further prioritize specific gender aspects or goals in the political agenda. In that view the key gender issues are highlighted and the outcomes can be used for advocacy. Such activities help to build social support and awareness of the problems women and men face in the specific country or region. On the other hand gender indexes can be used for monitoring of work of the governmental or international institutions to hold them accountable for their commitments to gender equality. Thus, the gap between *de jure* and *de facto* can be identified and compensated. Finally, they can be used for periodical evaluation of strategies, policies, agendas and interventions, to reveal barriers and better plan future actions to achieve gender equality goals (Moser 2007: 6-8).

The most popular and also most criticised gender indexes used to be: Gender-related Development Index (GDI) and Gender Empowerment Measure (GEM) developed in 1995 by UNDP as a supplement to Human Development Report (HDR). In 2010, after certain modifications to remedy the shortcomings of both these measures, they were combined, improved and introduced as a new **Gender Inequality Index** (GII). Latest HDR (2013) provides the technical notes on calculating the indicator. GII takes into account three main dimensions: health (composed of maternal mortality ratio and adolescent fertility rate), empowerment (comprising women and men with at least secondary education and women and men share in the parliament) and labour market (understood as rates of both sexes labour force participation). Precise formulas are explained in the technical notes appendix to the report (2013: 5-6). The GII value shows percentage of potential human development lost due to gender inequality. The world average score was 0.463 in 2013 (HDR 2013: 19) which indicates a 46.3% loss in potential human development due to gender inequality. Norway has reached 5th position in the world's rank (6,5% loss), Poland 24th (14% loss).

This final indicator is still criticised for being too complex, not transparent for decision makers, for mixing indices, using of the same set of indicators for all countries despite the culture differences and finally not including unpaid work in the calculations (Klasen and Schüler 2011; Permanyer 2011).

Three dimensions are also embodied by **Gender Equity Index** (GEI) reckoned by Social Watch (SW) since 2007 (latest data comes from 2012) (GEI 2012). It measures a gap between women and men in economy (which includes gaps in labour force and estimated income, as well as non-vulnerable employment), education (assessing primary, secondary and tertiary school enrolment and adult literacy rate) and political empowerment (evaluating number of women in ministerial positions, their share of parliament seats, women among legislators, senior officials and managers, and finally women as professional and technical workers). In each of the three areas a value for the gender gap is calculated in a scale from 0 (when e.g. no single woman is educated and all men are) to 100 (perfect equality). Final GEI is computed for each country as average of these three dimensions. In ranking Norway takes first position (with 89 points) and Poland 28 (with 76). What is interesting, at the SW web page this index is compared (correlation analysis) to other measures, which include gender component, like described above GII or in the first part of this evaluation HDI and BCI (see Fig. 1).

Figure 1. Correlation analysis between GEI and other indexes



Source: http://www.socialwatch.org/node/14370 (access 17.03.2014)

This picture makes an impression that GEI is a credible and universal index, but one of the similar, already existing indicators. The question emerges, if there is a need to create one more index similar to others, or rather to focus on gender differentiations and transformations (see the discussion about different visions of achieving gender equality initiated above)? To do so, the qualitative studies in examined countries and regions are necessary. However, at the same time the social sciences research team of SW emphasizes:

> [a]lthough their construction does involve technical elements, indicators can and should be accessible for appropriation and criticism by the community. This constitutes part of citizenship construction by enabling dialogue and monitoring based on transparent and responsible information management on the part of both citizens and governments. (Social Watch 2007: 3)

Therefore, the implementation of SW indexes and their further use leave an open space for local deliberations and modifications, which in turn consists a surplus value to the index.

Next indicator presented here was introduced by the World Economic Forum (WEF) in 2006 and is called **Global Gender Gap Index** (GGGI) (World Economic Forum 2013). The disparities based on gender and their progress are defined according to the gaps in four categories: economic participation and opportunity (labour force participation rates, ratio of estimated female-to-male earned income, wage equality for similar work (qualitative variable), the ratio of women to men among legislators, senior officials and managers, the ratio of women to men among technical and professional workers); educational attainment (ratios of women to men in primary-, secondary- and tertiary-level education, the ratio of the female literacy rate to the male literacy rate); health and survival (sex ratio at birth and gap between women's and men's healthy life expectancy); and political empowerment (ratio of women to men in minister-level positions, the ratio of women to men in parliamentary positions, ratio of women to men in terms of years in executive office (prime minister or president) for the last 50 years) (World Economic Forum 2013: 3-4). The authors point out three fundamental principles underlying the index "[f]irst, it focuses on measuring gaps rather than levels. Second, it captures gaps in outcome variables rather than gaps in means or input variables. Third, it ranks countries according to gender equality rather than women's empowerment" (World Economic Forum 2013: 3). The construction of index, including used data sources, is outlined in the report (pp. 4-7). Pointing at missing data in specific countries (initially 200 were taken into consideration) the final ranking of 136 was prepared. In that comparison Norway is 3rd (on the second position in years 2010-2011) and Poland is 54th (but was on 42nd position in 2011). The possibility of progress observation since 2006, as well as detailed scores of

the subindexes and their ranks, can serve decision-makers by giving them tips in which directions countries should evolve to close their gaps and improve women situation. Undoubtedly for Norway it would be health and survival and for Poland economic participation and opportunity category. Still, GGGI is not free from shortcomings. As Juanita Elias from the Australian Griffith University states "there are certain problems with its approach to gender equality. Some of these stem from the actual measures used and some of these concern how the data is used in terms of building business-case arguments for gender equality which, I believe, serve to narrow and restrict arguments for gender equality in unhelpful ways" (Elias 2012). It is difficult not to agree with her argumentation, since WEF is neither an institution independent from an influence of business sector nor from research sponsors.

Mentioned in the first part of this study British weekly magazine "The Economist" except from constructing the Quality of Life Index has also developed **Women's Economic Opportunity Index** (WEOI) (see also Fig. 1). The latest (second) study from 2012 (to be clear – sponsored by ExxonMobil Corporation) looks beyond gender disparities to the essential factors affecting women's access to economic opportunities in the formal economy (EIU 2012: 5). What makes the Index interesting is the definition of these opportunities in the conceptual framework of Institutionalism as: "set of laws, regulations, practices, customs and attitudes that allow women to participate in the workforce" (ibid.). As we can read further the outcomes are interpreted in that spirit e.g. "[r]obust, gender-sensitive legislation and progressive cultural norms kept Sweden and Norway at the top of the Index" (ibid.). The baseline five categories are taken for consideration in this Index: labour policy and practice (which includes: equal pay for equal work, non-discrimination (fulfilling the UN Conventions records), maternity and paternity leave and provision, legal restrictions on job types for women, difference between the statutory retirement age, discrimination against women in the workplace and availability, affordability and quality of childcare services); access to finance (ability to build a credit history for women, access to finance programmes, delivering financial services, private-sector credit as a percentage of GDP); education and training (primary, secondary and tertiary school life expectancy for women, mean years of schooling, adult literacy rate of women, existence of programmes offering small and medium-sized enterprise support or development training); women's legal and social status (existence of laws protecting women against violence, freedom of movement, dress code in public, access to passport, property ownership rights, adolescent fertility rate, prevalence of contraceptive use, ratification of CEDAW (Convention on the Elimination of All Forms of Discrimination against

Women), percentage of women in ministerial positions, and in parliament); and general business environment – not differentiated by gender (regulatory quality, procedures, duration, cost and paid-in minimum capital for starting a business, infrastructure risk, percentage of population with access to mobile phones, internet, water, sanitation and electricity) (EIU 2012: 27-28). Selection of above described factors is justified by aim of monitoring the environment for both women employees and women entrepreneurs. As mentioned before, Sweden and Norway are the top countries in the presented comparison, Poland can be found at 34th place. Again, criticism of WEOI can follow the same direction as criticism of GGGI portrayed above. In both cases women are striving for equity understood as sameness of women and men (and only in professional life), not challenging the dominant male norms and values. Additionally, the neoliberal premises for construction of this Index are displayed in the Executive Summary: "[i]n an environment of waning growth, growing skills shortages and intensifying global competition, bringing trained women into the workforce should now be seen for what it is: an economic and business imperative" (EIU 2012: 7). However, the combination of that indicator (undoubtedly, the professional life is important for women) with well-being fields analysed in the first and second part of this analysis may constitute a desirable combination. E.g. such dimensions as physical and emotional health, environment, unpaid/paid work gender division, work/life balance or subjective well-being could be included in GEQ indicator.

The institutional approach brought in the previous paragraph is developed further in the **Social Institutions and Gender Index** (SIGI) presented for the first time in 2009 by OECD Development Centre (OECD 2012). The authors explain that

> [i]nstead of measuring gender inequality in education, health, economic or political participation, these indices allow a new perspective on gender issues in developing countries. The SIGI and the subindices measure long-lasting social institutions which are mirrored by societal practices and legal norms that frame gender-relevant meanings and form the basis of gender roles. (Branisa, Ziegler and Klasen 2010: 1)

Latest ranking from 2012 covers over 100 countries and provides additional information about them, which enables a reader to get to know the context and to understand how social institutions discriminate against women. However, still the authors sensitize that "by aggregating variables and subindices, some information is inevitably lost [...] to understand the situation in a given country additional qualitative information could be valuable" (ibid.: 17). The final indicator is composed of 14 variables grouped into 5 sub-indices: discriminatory family code (legal age of marriage, early marriage, parental authority and inheritance), restricted physical integrity (violence against

women, female genital mutilation and reproductive integrity), son bias (missing women and fertility preferences), restricted resources and entitlements (access to land, access to bank loans and other forms of credit, access to property other than land) and restricted civil liberties (access to public space and political voice) (OECD DEV 2012: 30-33). Except from the major findings that

> discriminatory social institutions, such as women's lack of access to resources, discrimination in the family and gender-based violence are related to:
> •Poor progress on MDGs such as child health, maternal mortality and primary school completion.
> •Lower agricultural production and food insecurity.
> •The feminisation of informal employment (OECD 2012),

the summary provides the comparison of results from 2009 and 2012. Therefore, we can read that: "the number of countries with specific legislation to combat domestic violence has more than doubled from 21 in 2009 to 53 in 2012" or "29 countries have quotas to promote women's political participation at both national and sub-national levels" (OECD DEV: 4). This indicator can be perceived as a supplement to the typically outcome-focused measures presented in the previous paragraphs. It helps to identify countries and social institutions that deserve attention, thus helping to act against deprivation of women.

Finally, two more indexes developed for the European Union should be mentioned here. First, the **European Union Gender Equality Index** (EUGEI) based on Nancy Fraser universal caregiver model (Fraser 1997, Plantenga et al. 2009) and second, recently published the **Gender Equality Index** (GEI), which builds upon the first one (EIGE 2013). EUGEI is composed of four dimensions: equal sharing of paid work (labour force participation and unemployment), equal sharing of money (pay and income), equal sharing of decision-making power (political power and socio-economic power) and equal sharing of time (caring time and leisure) (Plantenga et al. 2009: 25). The authors also justify from the law perspective, why certain dimensions were chosen and what they mean for gender equality in the light of European Union agreements. The index was calculated for 25 EU countries and in that overall ranking Poland is sixteen on the list (on the basis of data from 1998-2005) (ibid.: 31). The last indicator described here (GEI) includes previous spheres (covered by EUGEI) and adds new ones, some taken into consideration by other indexes described above. Therefore, it illustrates gender inequalities in more comprehensive way. It concerns eight domains: work (participation, segregation and quality of work), money (financial resources and economic situation), knowledge (educational attainment, segregation and lifelong learning), time (economic activities, care activities and social activities), power (political, social and

economic), health (status, behaviour and access), intersecting inequalities (age, citizenship, disability, ethnicity, religion, sexual orientation andclass) and violence (direct and indirect) (EIGE 2013: 18-33). So far, the last two significant and new dimensions, due to difficulties in measuring are reflected only to limited extent (violence is not calculated in the index, but is intended to after the violence against women EU survey[4], and intersecting inequalities concern only sphere of employment). Still, this is the most complex and broad indicator, thus it can expose subtle differences of women's status and lives in very similar European Union countries.

Table 2. presents a comparison of seven described above gender indicators according to the thematic fields covered by them.

Table 2. Summary of the gender indicators (dependant on the analytical aspects included)

GII	labour market	health	-	empowerment	-
GEI (SW)	economy	-	education	political empowerment	-
GGGI	economic participation and opportunity	health and survival	educational attainment	political empowerment	-
WEOI	labour policy and practice	-	education and training	women's legal and social status	access to finance general business environment
SIGI	-	restricted physical integrity, son bias	-	discriminatory family code, restricted civil liberties	restricted resources and entitlements
EUGEI	equal sharing of paid work	equal sharing of time	-	equal sharing of decision-making power	equal sharing of money
GEI (EU)	work	time, health, intersecting inequalities	knowledge	power, violence	money

As can be observed in the above comparison, most of the analysed indicators include areas of labour market and political empowerment of women. Health, education and additional assets (last column) are present to some extent. Comparing to Table 1, which included ten major scopes of analysis, gender indicators look rather modestly. However, we can also observe that three fields

4 See the official site of European Union Agency for Fundamental Rights: http://fra.europa.eu/en/publication/2014/vaw-survey-main-results (access: 20.03.2014)

are covered by most well-being and gender indexes: the labour market, health and education. That information can be used in the future work on GEQ index.

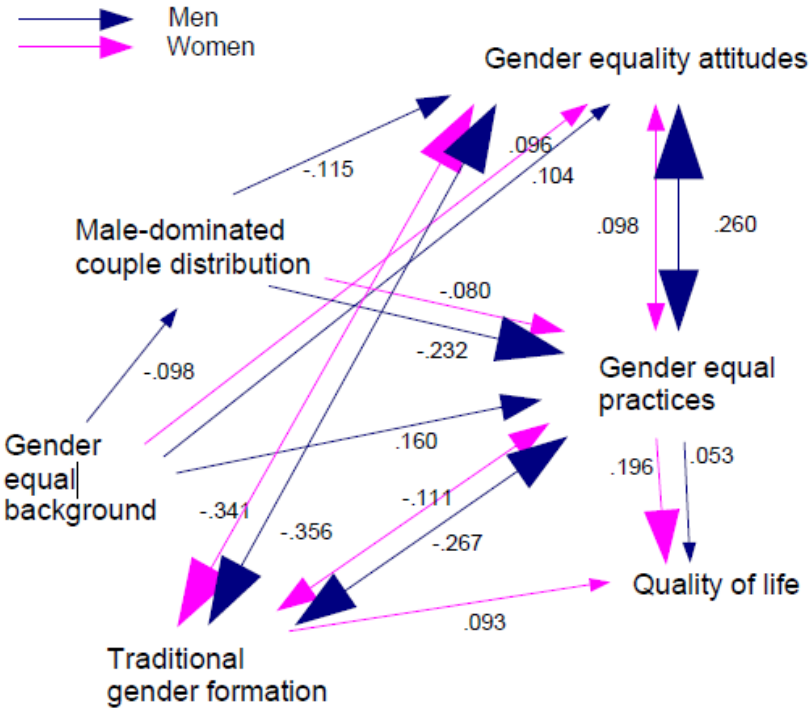
Other initiatives on gender equality

In the scope of productive work, on the microeconomic level, UNDP has elaborated **Gender Mainstreaming Scorecard** to effectively measure organisations' development towards gender equality (starting evaluation of progress from its own units). Scorecard is based on six parameters: corporate commitments, implementation mechanisms (strategy documents and resources), internal capacities (gender experts and training in gender analysis), gender mainstreaming in project cycle (guidelines, checklists, formats, mainstreaming in project documents, monitoring and evaluation), accountability mechanisms (gender targets are included in senior managers' performance targets and gender indicators are used for reporting in more than 50 percent of programmes) and organisational culture (gender sensitisation training and prevention of sexual harassment) (Moser 2007: 20). A score between one and five is given to each of the criterions. This simple tool can be used for self-evaluation not only by the international institutions, but also by any organization interested in introducing gender mainstreaming strategies, including public universities.

In case of gender disaggregated data and the field research, three national achievements are worth mentioning in this study: Australian, Canadian and Norwegian. **Australian Bureau of Statistics** (ABS) issues data (latest from February 2014) dividing outcomes into six major areas of social concern for gender equality: economic security; work and family balance; education; health; safety and justice; democracy, governance and citizenship (ABS 2014). Every interested person can have a look at the ABS website and see the components of domains and sources of presented data. Such a base can be recognized as a good practice for other countries, demonstrating the importance of gender equality for government on the one hand and constituting a rich source for researchers and interested parties on the other. Canada (precisely **Canadian International Development Agency**) as one of the first countries in the world has issued a "Guide to Gender Sensitive Indicators" in 1997, widely quoted until today (CIDA 1997). This publication gave a basis for further work on progress measurement of gender equality, providing arguments for discussions, raising important questions and systematizing knowledge on gender and indexes. The main two aims of the Guide are to "promote conceptual and methodological understanding of indicators, with special emphasis on gender-sensitive indicators" and to "offer suggestions and

guidance for use of gender-sensitive indicators, with a particular focus on projects with an end-user focus" (CIDA 1997: 3-4). It is a recommended reading to all considering construction of the new index with gender component or trying to sensitize the existing one. Finally the third country, Norway (precisely **Nordic Gender Institute** and the **Work Research Institute**) has carried survey on the representative group of more than 1000 women and men in 2007 in order to find out more about gender equality developments in the country. Øystein Gullvåg Holter, the team leader of the described research, is also a member of the "Gender equality and quality of life" project – for which this expert evaluation is prepared. In the Norwegian survey the authors describe "[t]he task of the team was to design a study of men and women on men's attitudes to and understanding of gender equality in relationships, the family, working life and society" (Holter, Svare and Egeland 2009: 5). The questionnaire included 350 questions and was structured around eight areas of life: childhood, education, work, household, partner choice, children and parenting, experiences and attitudes towards gender equality, health and quality of life. The last two components are of special interest of GEQ project. This rich study can also serve as a toolbox that allows different models to be tested. The dimensions are mapped and indexed for future analysis. Some outcomes of the survey were surprising e.g. "men show somewhat greater consistency between gender equality related attitudes and practices, compared to women" (Holter, Svare and Egeland 2009: 146). Finally, results concerning intersection of gender equality and quality of life show among others that "gender-equal practices are associated with a higher quality of life" and "for the women, gender-equal practices at home are at least as important for quality of life as more generally acknowledged explanatory variables such as income, marriage/co-habitation and education" (Holter, Svare and Egeland 2009: 242). On Figure 2 the main correlations between indices taken into account in gender and well-being perspective are portrayed.

Figure 2. Correlations between main indices (bivariate analysis), Gender equality and quality of life 2007



Source: Holter, Svare and Egeland 2009: 153

This research can be perceived as an inspiration and a good practice for similar investigations in other countries, especially in those with different social and cultural backgrounds.

The last issue described in this section is prepared (work in progress) by the United Nations (Statistical Commission on the request of Inter-agency and Expert Group on Gender Statistics) a database of different indexes covering five major areas: health, education, employment, entrepreneurship and assets. It will include also a new set of indicators designed to measure violence against women. The United Nations Statistical Commission (UNSC) substantiates that "[t]he choice of indicators was guided by the primary criterion that indicators should address key policy concerns as identified in the Beijing Platform for Action and other more recent international commitments" (E/CN.3/2013/10: 3). To guarantee the minimum data necessary for the future comparative analysis the UNSC issued a questionnaire with 30 questions concerning national gender – disaggregated data availability. It received 126 responses and on that basis has formulated the recommendations concerning selection of future indicators. On that ground a minimum set of gender indicators was identified by Inter-agency and Expert Group on Gender Statistics, through its Advisory Group on Global Gender Statistics and Indicators Database. The five

defined domains of that set are: economic structures, participation in productive activities and access to resources; education; health and related services; public life and decision-making; human rights of women and girl children. Further in the report we can read that

> [t]he Evidence and Data for Gender Equality project will be implemented over three years (from July 2012 to December 2015) and will focus on: (a) the development of a platform for international data and metadata compilation covering education, employment and health indicators; (b) the development of international definitions and methods for measuring entrepreneurship and assets ownership; and (c) testing the newly developed methods to collect data on entrepreneurship and assets in selected countries, by adding a set of questions/module to planned surveys. (E/CN.3/2013/10: 4)

As soon as the manuals and guidelines for producing national statistics will be developed and *de facto* data collected, the valuable source for all kind of designed indicators (including gender and well-being) will be open to researchers, policy – makers and grass-roots initiatives. So far, the general review of the gender statistics programmes and responsible bodies in examined countries are attached to the report (ibid. 9-14).

Gender statistics

The main quantitative data sources used by described indicators and initiatives, which can be used also for other research and analyses, including GEQ project, are:

- The UN statistics and indicators on women and men: http://unstats.un.org/unsd/Demographic/products/indwm/ (access 19.03.2014)
- The UN Secretary-General's database on violence against women: https://www.un.org/womenwatch/daw/vaw/v-database.htm (access 19.03.2014)
- The World Bank gender statistics: http://data.worldbank.org/data-catalog/gender-statistics (access 19.03.2014)
- The OECD gender data portal: http://www.oecd.org/gender/data/ (access 19.03.2014)
- Inter-Parliamentary Union study on women in parliament: http://www.ipu.org/wmn-e/world.htm (access 19.03.2014)
- Labordoc of International Labour Organization: http://www.ilo.org/public/english/support/lib/resource/subject/gender.htm (access 19.03.2014)
- International Telecommunication Union ICT Statistics: http://www.itu.int/en/ITU-D/Statistics/Pages/default.aspx (access 19.03.2014)

Summary

The aim of this part of the study was to bring closer the discourse on gender equality and methods of inequalities measurement between women and men. The introductory part shows that there is a relationship between the income disparities and the status of women. That status, however can be differently defined, therefore I refer to three dissimilar gender equality theories and strategies. Next, these strategies are reflected in gender indicators and their critical review. Finally, other gender research initiatives are pointed out as well as data sources for future creation of GEQ index. Two more tips can be given here. First, BRIGE Gender and Indicators Cutting Edge Pack recommends to take into consideration among others the following steps in preparation of a gender indicator (Moser 2007: 43-46):

- to identify the objectives and goals based on the "vision of change" as a foundation for choosing appropriate gender indicators against which to track progress,
- to combine quantitative and qualitative data for broader scope of analysis,
- to use the participatory approach and invite various actors to discuss the created tool,
- if possible to move beyond only sex disaggregation to examine the gender dimensions of religion, ethnicity, disability status, place of residence, age – including the girl-child and the elderly – and psycho-sexual orientation,
- to ensure that the data produced is adequately analysed,
- to support and strengthen local statistics offices to produce gender responsive data,
- and to make obligatory the regular gender evaluations or internal audits.

Second, another useful guide Gender Evaluation Methodology for Internet and ICTs helps to go through the process of evaluation and outlines suggested strategies and methodologies for incorporating gender in the analysis. The tool is available on-line: http://www.apcwomen.org/gemkit/en/gem_tool/index.htm (access 19.03.2014). Despite the fact that it focuses on Internet and Information and Communication Technologies it can serve as a manual for planning other gender-responsive projects, comprising GEQ.

Discussion

What I intended to emphasize in this study is the variety of approaches to define well-being as well as gender equality. Therefore, in case of constructing the GEQ index both these notions must be distinctly determined. Additionally, many different forms of inequalities persist in respect to e.g. class, race, ethnic origin, age, disability, religion or psycho-sexual orientation (as described

in GEI (EU) indicator), thus focusing only on gender perspective seems to be rather narrow. One woman and man can have more similar status than two women in the same society considering the above mentioned characteristics. Hence, I would recommend adopting broader diversity perspective in future works on the index.

It is important also to remember that despite the influence of globalisation on cultures, they still differ and the occurring phenomena can have diverse origins. E.g. Hans Haferkamp and Neil J. Smelser observed that:

> [i]n the United States the deep institutionalization of the value of equality of opportunity has historically diminished tendencies toward collective class consciousness and the Social Change and mobilization of political parties on that basis, whereas in Japan the fundamental institutionalization of hierarchy and the relative absence of any notions of equality worked toward the same end. It might be added that it was mainly in the European countries, where the two ideas of hierarchy and equality have existed side by side in uneasy tension, that class-based political action has been more in evidence. Such is the power of fundamental "premises of society." (Haferkamp and Smelser 1991:12)

Therefore, initiatives understood and accepted in one country not necessary have an enthusiastic welcome in others. The work of ethnographers and anthropologists is crucial in that cases, as well as role of qualitative research methods[5].

Rapid changes in our environments and resistance to *homo economicus* code of conduct after the last financial crisis, make people look for new qualities in life, not necessarily bound with the material affluence. This double movement against capitalism (after Karl Polanyi 2001[1944]) and especially opposition to its manifestation in consumerism, has brought about public debates on commons, collective governance, ethics and care. Few years ago participatory budgets were a dream in Poland, now they are implemented in many small and big districts across the country. In the upcoming years, when the economies enter the degrowth era, we must be prepared to live differently than now, what also requires other forms of social and economic organization. Hence, once the GEQ index is worked out, it will be good to make revisions and additional fieldwork research in the future to capture these changes.

Conclusion

The intention of this study was to show various views on well-being, social development and gender equality as notions defined by authors representing different theoretical backgrounds.

5 Recommended reading concerning use of data and different scales is “Compendium on Gender Scales”, accessible on-line: https://www.c-changeprogram.org/content/gender-scales-compendium/about.html (access 20.03.2014)

Focusing on aim of creation of a new index that will cover these fields I have quoted examples of existing indicators and compared them in tables. Their critical reviews placed in this paper point out their advantages and defects, at the same time showing the general tendencies in their construction (main analytical aspects build in columns) and the data included. I have also pointed at the data sources, what is important in deliberations on what the new index might communicate. Earlier research and theories quoted intended to show the complexity and intersectionality of the problem uneasy to cope with. I believe that underlined in this analysis aspects and approaches will be helpful to GEQ project team in designing the new ground-breaking indicator and I also hope that this study was interesting to other readers, which might translate it into reality in many other different ways, improving not only gender equality but also well-being of many people, communities and whole societies. After all, the only constant matter is change.

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